



REPLY TO
ATTENTION OF

DEPARTMENT OF THE ARMY
INSTALLATION MANAGEMENT AGENCY
SOUTHWEST REGION
1204 STANLEY ROAD, SUITE 9
FORT SAM HOUSTON, TX 78234-5009

SFIM-SW-HR

10 DEC 03

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: Southwest Region Office (SWRO) Installation Management Agency (IMA) Guidance Memorandum #7 – Establishing Rating Schemes for Civilian Staff Principals

1. REFERENCES:

- a. Memorandum, Department of the Army, Installation Management Agency, 29 Jul 03, subject: US Army Installation Management Agency Policy Memorandum #8, Evaluation Reports and Performance Appraisal Processing (enclosure 1).
- b. Memorandum, Department of the Army, Installation Management Agency, Memorandum of Agreement between Director, Department of the Army Installation Management Agency and Commander, Network Enterprise Technology Command/9th Army Signal Command, 29 Apr 03, subject: Delineation of the Functional Responsibilities and the Funding and Operational Relationship.
- c. AR 690-400, Chapter 4302, Total Army Performance Evaluation System, 16 August 1998.

2. PURPOSE. To provide guidance to all SWRO Garrisons.

3. APPLICABILITY. These procedures are applicable to establishing civilian rating schemes for all civilian personnel assigned to and/or under the operational control of the SWRO IMA.

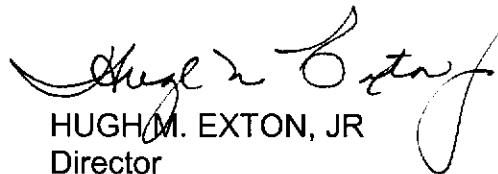
4. PROCEDURES.

- a. My long-term intent is to place the rater/senior rater function for the principal garrison civilians at the local level and to involve the deputy in the rating scheme. HQ IMA is in the process of developing the standard Position Descriptions (PD) for the Deputy to the Commander position and I fully expect the PD will include supervisory responsibilities to maintain their current grade levels.
- b. Garrison Commanders have the option to serve as both the rater/senior rater for your principals if the deputy is not currently involved. The only garrison civilian performance plans, support forms, and evaluations I wish to become involved with as the senior rater are those for the Deputy to the Commander and the installation Director of Information Management. Revised rating scheme matrices are enclosed.

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SUBJECT: Southwest Region Office (SWRO) Installation Management Agency (IMA)
Guidance Memorandum #7 – Establishing Rating Schemes for Civilian Staff Principals

5. PROPONENT. The Human Resources Division is the proponent for this Guidance Memorandum. POC is Randy Blackburn, Management Assistant, at (210) 221-1162, DSN 471-1162, or email randy.blackburn@samhouston.army.mil.


HUGH M. EXTON, JR
Director

2 Encls

1. IMA Policy Memorandum #8
2. Revised Matrix

DISTRIBUTION:

Garrison Commander, Fort Bliss, Bldg. 2A Sheridan Road, Fort Bliss, TX 79916

Garrison Commander, Fort Hood, Bldg 1001, Room 312, Fort Hood, TX 76544

Garrison Commander, Fort Huachuca, 2837 Boyd Ave, Fort Huachuca, AZ 85613-7001

Garrison Commander, Fort Irwin, PO Box 105021, Fort Irwin, CA 92310-5021

Garrison Commander, Fort Polk, 7330 Mississippi Ave, Fort Polk, LA 71459

Garrison Commander, Fort Sam Houston, 1206 Stanley Road, Bldg 122, Suite A,
Fort Sam Houston, TX 78234-5001

Garrison Commander, Fort Sill, Bldg 455 McNair Hall, Room 114, Fort Sill, OK 73503

Garrison Commander, Presidio of Monterey, 1759 Lewis Road B-614, Monterey, CA
93944-3223

Garrison Commander, White Sands Missile Range, Bldg 100, Headquarters Ave, White
Sands Missile Range, NM 88002

Garrison Director, Yuma Proving Ground, 301 C Street, Yuma, AZ 85365-9124



DEPARTMENT OF THE ARMY
INSTALLATION MANAGEMENT AGENCY
2511 JEFFERSON DAVIS HIGHWAY
ARLINGTON, VA 22202



JUL 29 2003

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MEMORANDUM FOR US Army Installation Management Agency Personnel

SUBJECT: US Army Installation Management Agency Policy Memorandum #8,
Evaluation Reports and Performance Appraisal Processing

1. REFERENCES.

- a. AR 623-105, Officer Evaluations Reporting System, 1 April 1998.
- b. AR 623-205, Noncommissioned Officer Evaluation Reporting System, 15 May 2002.
- c. AR 690-400, Chapter 4302, Total Army Performance Evaluation System, 16 August 1998.

2. PURPOSE. To provide guidance to all US Army Installation Management Agency (IMA) personnel on Evaluation Reports and Performance Appraisal Processing.

3. APPLICABILITY. These procedures are applicable to all military and civilian personnel assigned and/or under the operational control of IMA.

4. POLICY.

a. Evaluation reports will be prepared fairly, accurately, and in a timely manner. All military evaluation reports must arrive at their respective Department of the Army final processing activity no later than the respective suspense date after the ending date of the report. Civilian performance appraisals will be completed on schedule in keeping with the rating periods established in reference c.

b. The evaluation report document is the single most important document in a soldier's or civilian's personnel record. Late submissions of civilian appraisals and soldiers evaluation reports may have a significant impact on the promotion and selection process. Late submission of military evaluations can adversely affect a soldier's career. Likewise, civilian performance appraisals are linked to numerous personnel actions affecting civilian employees. Late evaluations are detrimental to the Army's overall effectiveness of selecting the best-qualified individual for promotion, assignments, and schooling. The feedback to employees provided by performance appraisals is essential to effective and efficient management of the workforce.

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SUBJECT: US Army Installation Management Agency Policy Memorandum #8,
Evaluation Reports and Performance Appraisal Processing

c. The Army's timeliness standard is 100% for evaluations and appraisals. All soldiers and civilians in leadership positions will meet that standard.

5. PROCEDURES.

a. Military evaluations and rating schemes:

(1) Soldiers will be incorporated into the unit-rating scheme immediately upon arrival. Rating schemes for garrison/ASG/BSB commanders and command sergeants major are established as indicated in the enclosed rating scheme matrixes. Exceptions must be approved by the Director, IMA. HQ, IMA and IMA Region rating schemes will be updated quarterly and submitted to HQ, IMA, Human Resources Division, no later than the last working day of the quarter. Negative responses are required.

(2) All evaluations will be prepared in accordance with references above, with special emphasis on accuracy and timeliness. All evaluation reports will be finalized by the 30th calendar day after the end date of the report. Rating officials will establish internal suspense controls, which will permit completion of reports on time. For those evaluation reports requiring rating or review by the HQ, IMA office of the Director, rating officials will ensure that the reports arrive at HQ, IMA no later than the 20th calendar day after the end date of the report. After completion, these reports will be forwarded to the local Personnel Center for final processing. Senior raters mailing officer evaluation reports (OER) to the US Army Personnel Command will ensure reports arrive no later than the 90th calendar day after the end date of the report.

(3) Region Directors, when preparing garrison commander evaluations, will solicit feedback from senior commanders of tenant organizations at the installations. Feedback should address how the garrison commanders are supporting their mission and operations. This feedback is not to be categorized as a letter of input for garrison commander evaluations but as a way to assess the level of support garrison commanders provide to all organizations within their respective installations.

b. Civilian performance ratings and appraisals:

(1) Each civilian employee will receive an annual performance rating. Rating dates are established by DA regulation for employees rated under the senior system part of the Total Army Performance Evaluation System (TAPES), reference 1c. The rating cycle for TAPES Base System employees ends on 30 September. Appraisals are due 45 days following the end of the HQ, IMA cycle. The supervisor may recommend

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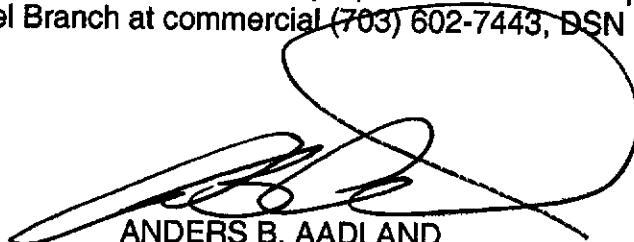
SUBJECT: US Army Installation Management Agency Policy Memorandum #8,
Evaluation Reports and Performance Appraisal Processing

quality increases or other forms of recognition for employees whose individual performance meets the criteria for cash awards.

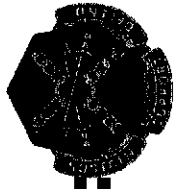
(2) In those instances when employee performance is judged to be "fair" or "unsuccessful," managers must contact the servicing CPAC prior to taking any action. In keeping with reference 1c, a number of additional procedural steps may be required in such cases.

6. PROPONENT. The Human Resources Division is the proponent for this IMA policy. POC is the Chief, Military Personnel Branch at commercial (703) 602-7443, DSN 332-7443.

Encl
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ANDERS B. AADLAND
Major General, GS
Director



Colonel Garrison/ASG Rating Scheme

Position	Rater	Intermediate Rater/ Senior Rater	Senior Rater/ Reviewer
Garrison/ASG Commander Colonel	Region Director	N/A	Installation/Senior Mission Cdr
Deputy Garrison/ASG Commander (Military)	Garrison/ASG Commander	Region Director	Installation/Senior Mission Cdr
Deputy Garrison/ASG Commander (Civilian)	Garrison/ASG Commander	None	Region Director
Garrison/ASG CSM	Garrison/ASG Commander	Region Director	Installation/Senior Mission Cdr
Garrison/ASG Staff Principals (Military)	Garrison/ASG Commander	Region Director	Installation/Senior Mission Cdr
Garrison/ASG Staff* Principals (Civilian)	Garrison/ASG Commander	None	Region Director

*Deputy Garrison Commander could rate GS13↓ w/GC as IR and RD as SR



LTC Garrison/BSB Rating Scheme

Position	Rater	Intermediate Rater/ Senior Rater	Senior Rater/ Reviewer
BSB Commander	ASG Commander	Region Director	Installation Cdr/ Senior Mission Cdr
LTC Garrison Commander	Region Director	None	Installation Cdr/ Senior Mission Cdr
Deputy Garrison/BSB Commander (Military)	Garrison/BSB Commander	Region Director	Installation Cdr/ Senior Mission Cdr
Deputy Garrison/BSB Commander (Civilian)	Garrison/BSB Commander	None	Region Director
BSB CSM	BSB Commander	ASG Commander	Region Director
LTC Garrison CSM	Garrison Commander	Region Director	Installation Cdr/ Senior Mission Cdr
BSB Staff Principals (Military)	BSB Commander	ASG Commander	Region Director
LTC Garrison Staff Principals (Military)	Garrison Commander	Region Director	Senior Mission Cdr
LTC Garrison Staff Principals (Civilian)	Garrison Commander	None	Region Director



ALTERNATIVE (SWRO DIRECTOR OPTION)



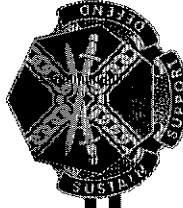
COLONEL GARRISON/ASG RATING SCHEME

Position	Rater	Intermediate Rater/ Senior Rater	Senior Rater/ Reviewer
Garrison/ASG Commander Colonel	Region Director	N/A	Installation/Senior Mission Cdr
Deputy Garrison/ASG Commander (Military)	Garrison/ASG Commander	Region Director	Installation/Senior Mission Cdr
Deputy Garrison/ASG Commander (Civilian)	Garrison/ASG Commander	None	Region Director
Garrison/ASG CSM	Garrison/ASG Commander	Region Director	Installation/Senior Mission Cdr
Garrison/ASG Staff Principals (Military)	Garrison/ASG Commander	Region Director	Installation/Senior Mission Cdr
Garrison/ASG Staff Principals (Civilian)	Deputy Garrison or Garrison/ASG Commander	None	Garrison/ASG Commander

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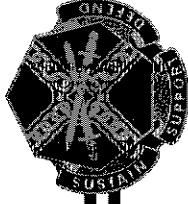
ALTERNATIVE (SWRO DIRECTOR OPTION)



LTC GARRISON/BSB RATING SCHEME

Position	Rater	Intermediate Rater/ Senior Rater	Senior Rater/ Reviewer
BSB Commander	ASG Commander	Region Director	Installation Cdr/ Senior Mission Cdr
LTC Garrison Commander	Region Director	None	Installation Cdr/ Senior Mission Cdr
Deputy Garrison/BSB Commander (Military)	Garrison/BSB Commander	Region Director	Installation Cdr/ Senior Mission Cdr
Deputy Garrison/BSB Commander (Civilian)	Garrison/BSB Commander	None	Region Director
BSB CSM	BSB Commander	ASG Commander	Region Director
LTC Garrison CSM	Garrison Commander	Region Director	Installation Cdr/ Senior Mission Cdr
BSB Staff Principals (Military)	BSB Commander	ASG Commander	Region Director
LTC Garrison Staff Principals (Military)	Garrison Commander	Region Director	Senior Mission Cdr
LTC Garrison Staff Principals (Civilian)	Deputy Garrison or Garrison/BSB Commander	None	Garrison/BSB Commander

(SWRO DIRECTOR OPTION)



DOIM AND CHAPLAIN RATING SCHEME

Position	Rater	Intermediate Rater/ Senior Rater	Senior Rater/ Reviewer
Director of Information Management (Civilian)	Garrison/ASG Commander	Regional Chief Information Officer	Region Director
Director of Information Management (Military)	Garrison/ASG Commander	Regional Chief Information Officer	Installation/Senior Mission Cdr
Installation Chaplain	Garrison/ASG Commander	SWRO Chaplain	Installation/Senior Mission Cdr